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ABSTRACT

Arizona's career ladder teacher incentive program was established by the Arizona State Legislature in 1984 as a component of school restructuring efforts. A comprehensive and long-range developmental evaluation system is being developed for the restructuring program, but the program is at risk of being eliminated due to the negative influence of political expediency and lack of follow-through on the part of governmental leaders. Key process requirements for effectively planning and implementing a long-range developmental evaluation system are outlined, based on the premises that positive change is long-range, holistic, developmental, and systematic, and requires research and development. Such an evaluation system calls for a baseline needs assessment followed by application of a cyclical evaluation process which addresses the identified needs, makes plans for change, implements programs, assesses programs, documents program development, and reports progress. Attached to the paper are 10 "exhibits" illustrating aspects or models of the evaluation process. (Contains 25 references.) (JDD)

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GOING BEYOND LIMITATIONS IN THE
ARIZONA CAREER LADDER
PROGRAMS MODEL:

Building a Comprehensive and
Effective Schools Outcomes Reform System in a
Non-Career Ladder School District

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"Restructuring Education: Visions and Vistas"
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**GOING BEYOND LIMITATIONS IN THE
ARIZONA CAREER LADDER
PROGRAMS MODEL**

INTRODUCTION

In good faith teachers and the teaching profession have again shown their willingness and abilities to effect school change and reform. They are yet again being shown that political leaders and government lack the capabilities to effectively carry through on meeting promises and long-range positive change & development of the public schools.

Overview

Starting in 1984, the Arizona State Legislature initiated a significantly positive move in beginning the development of the career ladder educational incentive and reform movement. They systematically followed procedures which could have been the developmental beginning of true and lasting restructuring and change in the government-sponsored and directed schools. In initially developing policy they designated Northern Arizona University to conduct outside "evaluation or policy research" over a five-year period. In this unique manner, the legislature pilot-tested the school restructuring and teacher incentive program, and secured objective knowledge and information before making decisions and formulating policy. This is the way reform can and does work, but these astute procedures and intentions may again be laid to waste due to political expediency and the inability of governmental leaders to follow through on initiatives and promises.

In 1993, through quick and radical changes affecting the area of funding incentives, the State Legislature and Governor's Office are making moves which will be counter to the intent and purpose of educational reform. In doing this they will not only stop progress, but they will again demonstrate to teachers that government cannot be trusted to carry through with continuity of purpose. As a result the very important fabric of motivation, positive communication and morale will again become a shambles. This is not the way to treat a profession so important to our children, let alone the generally negative impact such decisions will have on total school performance in these challenging times.

The NAU/Sedona/Oak Creek Partnership is moving ahead to apply a comprehensive and long-range developmental evaluation system which includes the factors needing to be built into the present career ladder restructuring and reform program, rather than withdrawal of support of the positive first steps toward a quality restructuring system. The state should be building in needed support to correct limitations rather than progressively weakening the only comprehensive reform movement they have at this time.

The crucial elements which need improvement include a sufficient R & D function to document and track district levels of improvement over a seven-year period. The districts will then know where they started with all key organizational components, and they can track improvement over a reasonable period which best accommodates time required for healthy change. It would be such a positive move ahead if legislative bodies could support schools with policy which would recognize the necessity of long-range, systematic, positive and healthy change, rather than initially appearing to serve a supportive role and then implementing major depreciating policy changes in the middle of significant progress.

Lasting Change and Reform

The career ladder program movement embodied the only comprehensive and potentially effective opportunity to move ahead with positive reform on a statewide basis. Rather than using the orderly and systematic approach needed for lasting change and reform, government is again reverting to its crises political and legislative procedures. They are effectively beginning to destroy an important component which will bring down ten years of positive development. Anyone can understand that radically changing one component of a program or organization will impact all the other parts (for expanded information, see the Reference section of this paper). Immediate dumping of state-formulated program structure and responsibility on school districts makes reform less capable of being successful in districts who were initially forward looking as compared with those who didn't join the movement in the beginning. Districts can start over on their own, but it will be a painful process rather than a systematic and developmental one.

There will be a long-range negative impact on teachers, schools and educational reform in the state due to any "quick-fix" change in a major part of the delicately balanced career ladder program, and this especially includes any immediate proposed funding change. We also know that positive change takes several years. With this knowledge about change as it relates to social and program issues, no major adjustment can improve or impact progress from past positive developments unless information, time and long-range

systematic assessment and evaluation are made available. Making expedient political decisions about improvement in schools cannot result in positive reform. Governmental and legislative bodies need to pass laws to follow processes, strategies and procedures which developmentally meet the "laws of nature," and which support orderly growth rather than implementing policy based on the whims of political "short-timers." The educational community needs a lasting and integrated support system, not short-range, manipulative and invalid policy and directions.

The laws of natural development and political and government policy procedures continue to work in conflict. With the career ladder program, operating in good faith, teachers and the teaching profession have again shown that they are eager and willing to move ahead in doing their part for development and improvement of themselves and schools. It is time that the policy makers start recognizing that lack of educational reform is most probably due more to their legislative-session approach, and not as a result of a lack of desire and motivation on the part of schools or teachers.

How the Process Works (or How Reform Could Continue without Failing)

The career ladders legislation demonstrated an excellent beginning in following positive evaluation research and developmental processes which can continue progress toward the goals of a higher-quality education for children and students. This advanced process is being implemented in one of the State's school systems, and it could become a model for "how it works."

Program and organizational development works just like human development and learning. Positive or successful development is orderly, sequential, unfolding, cumulative and continuous. The next step in change is taken from the last step in development, not cutting off an important member or component which affects all other parts. It also requires documenting (getting the information) before moving off in a meaningless direction. Counter to the recommendations forwarded by the outside researchers, the past legislatures failed to include requirements for meeting proper technological and objective evaluation research needs of career ladder school districts, and it has erroneously resulted in moving some schools ahead of their "readiness" levels of development. Through implementing just one or two improvements in the limitations observed in the present legislative policy, and providing a long-range plan for adjustment in areas which need changes (such as funding procedures), the state could have a very positive and developing educational system. Otherwise it will be responsible for governing over its own waste. Hopefully, the negative results won't again be blamed on lack of teacher motivation and desire.

Key Process Requirements for Success

Several process models and procedures for effectively planning and implementing a long-range developmental evaluation system have been formulated. They can be found in the Exhibits section of this paper, and all of them apply in some form to the key process requirements which are listed below.

The following represent the recommended next steps (principles and procedures) of educational leaders and legislators in moving ahead in effecting lasting reform, rather than choosing the more difficult option of starting over or failing:

- **Positive Change is Long-Range:** It is fruitless to try to effect change in an individual, organization or total system, or even in any of its parts, without a long-range plan, and/or without every formative step being cyclically researched, planned, implemented and refined (assessed, changed, improved, and developed). Small changes take at least three years in complex systems; large changes take more like seven to ten years to effectively reach desired goals, depending on the factor which is being improved (see Related Exhibits).
- **Positive Change is Holistic:** Change and development can only happen in a healthy way if the total set of individual, organization or system components are all addressed and nurtured at the same time; and also systematically observed at every successive phase. Whether it's a developing person or organization, changes made in isolated parts or components impact the total system. For example, if immediate and radical changes are made in the funding component of the total career ladder program, this will heavily impact on several important school components. One major factor of significant impact will be district and teacher morale. In turn, interpersonal relationships and communication will move in a negative direction, and students will ultimately suffer. This will be one of many possible consequences of lack of thoughtful and systematic change. In its deliberations, government typically fails to give adequate consideration to the most important factors which impact educational goals. Even though the lawmakers and leaders most likely had good intentions, not recognizing how the process can work results in failure (See Related Exhibits).
- **Positive Change is Developmental:** The next step in improving school reform in Arizona would be to develop and improve the already effective career ladder policy in the following ways:
 - (1) Integrate any new reform policy with the developed career ladders programs (it can take on any appropriate name, i.e., ACRM - Arizona Comprehensive Reform Movement);

- (2) Invite (require) all districts to join the reform movement;
- (3) Implement a revised reform process model which includes appropriate research and development technology;
- (4) Require existing and new districts to meet quality readiness levels (just like teachers are evaluated for promotion), rather than moving undeveloped ones ahead and thereby rewarding non-quality; and
- (5) Pass no legislative changes without providing the long-range evaluation research and process requirements for any changes or improvements which we know impact all parts of any system.

Teachers are effecting their required changes in the present CL programs; now the policy makers and district leaders should be forthcoming with supportive efforts which need to be accomplished within their respective positions of responsibility. For example, it may be that the state cannot afford the level of funding for each teacher which was initially established by the CL policy. On the other hand, teachers may still be motivated by a smaller increment for showing higher level expertise. A long-range approach may show that as long as the funding distribution is fair, the amount is not the only crucial issue involved. This kind of change takes a sufficient period of study and research before effectively being passed and implemented. Otherwise, past positive efforts (development) will be wasted.

- **Positive Change Requires R & D:** The three major factors of importance for organizational impact and success are the following: (1) A positive communication climate; (2) following natural laws of development in everything important; and (3) documentation and tracking of progress of a long-range developmental and improvement process. Without a strong and well-developed R & D unit, it is impossible to track improvement in the system, let alone being able to observe the evidence of higher-quality student learning and success. This important component should be set in place before any moves are made to implement plans or programs.
- **Positive Change is a Systematic Process:** Change requires following natural laws (see the Exhibits for an example of principles & laws which apply to human and organizational development); and there are simple process models which help to meet those needs. Workable, tried and valid processes for systematic development and improvement toward meeting educational goals are as follows:
 - A. **The Systematic/Developmental Assessment and Process:** The assessment and process is simple, but it must be consistently and effectively followed in order to determine district needs and document sequential change and improvement in those key district and program areas over a long-range period. The following

information provides a listing of an organized process which is necessary to follow and repeat consistently to reach the school's mission and goals:

- **Baseline Needs Assessment**

First, a baseline needs assessment is implemented. This provides us a general picture of key areas which the district has initially identified as being important to address.

- **Baseline Components & Profile**

A list of key organizational components, observations, analysis and recommendations provide the beginning point for application of the "cyclical evaluation process." A workable process for application is as follows:

1. **Organize to Address the Needs/Issues:** The first step requires organizing individuals into groups who have a key interest, role and personal potential for impacting positive change in a given target area or issue. A process which has been successful is to start with a small and representative steering committee or task force which begins assisting with organizing key orbital committees responsible for addressing specific needs areas which have been and will continue to be identified. Each group **documents** relevant structure and purpose from the beginning and in all subsequent recycling of the process. After organizing the group/s, **record or document** the progress level already existing in the area of committee responsibility.
2. **Planning to Develop, Change and/or Improve:** The planning phase is crucial to future clarity and quality of impact on positive change for each need or issue. Short- and long-range plans or programs and their purpose are necessary before implementation. Document specifics of each plan, program and purpose for future evaluation of quality and impact.
3. **Implementation of Program Plans:** When the plans have been well formulated, clear and documented, and a time line has been established, the next step is to begin their application or implementation. The time line for assessment of program impact on change depends on the issue or need. For example, the required time for development of a school/community survey may be one week, while planning for development for a complete and valid curriculum may span the total seven-year range. **Document** proposed time lines.
4. **Assessment of Program Development and Improvement:** Next, based on time lines, each area of need is assessed to determine progress, change or improvement. **Document** the readiness or progress level of improvement.
5. **Documentation of Program Development and Improvement:** Recording or documentation of all steps and phases is crucial to know the beginning point of any step and to profile improvement. Please remember to seek assistance with development of valid quantitative and qualitative observational and information collection procedures, and analysis and reporting of information, so that it is simple, clear and concise.
6. **Reporting and Profiling Progress Toward the Goal:** Reporting of the results of the plans and programs needs to be clear and simple. A way to

"profile" the level of progress for each issue or need addressed can be created or accomplished.

7. **Cyclical Development and Improvement:** The next step is to repeat the former steps based on time lines, as follows: (1) organize or reorganize, (2) plan, (3) implement, (4) formatively assess, (5) document, (6) report, (7) cycle, and (8) periodically summatively evaluate.

B. Assessment and Process Summary

The developmental evaluation assessment and process is as important as the areas of need to be addressed. Without systematically and sequentially moving from the developmental or readiness level of each part, individuals and organizations fail to progress in a "healthy" manner. In making changes, organizations appear to be tied to the same natural principles or laws as those operating in human development and learning. For example, progress is sequential, it is accumulative, and in its development it takes more time in the beginning than during later stages. Trying to improve beyond readiness levels results in weakened parts, or often in total blockage or failure in moving toward the desired objectives, goals and mission of the district.

There will be other components and sub-components which will arise out of the planning and documentation phases. If they are important for the holistic improvement of the organization, they will need to be addressed. Other requirements of a complete evaluation system are that of evaluating the impact or relationship of any joint partnership between a university or private business and school systems, and making any needed adjustments in this relationship over the long-range assessment and process period.

Summary and Conclusions

Present career ladder district administrators, teachers, program policy makers and developers have the opportunity to advance beyond the few limitations in the present career ladder model and policy requirements. This paper and models can assist districts in knowing about the appropriateness of implementing basic qualitative and quantitative evaluation research techniques. This type of "R & D Technology" will allow needed profiling and tracking of development and change in important district goals related to areas such as student achievement, assessment of learning, curriculum validation and alignment, personnel evaluation, communication environment, and other key areas of concern over a long-range time period.

Long-range evaluation research requires application of a simple process which goes beyond finding out where something is after the fact. To know how much progress is made by students, teachers, school districts and other organizations, change or impact can

only be measured if an initial level of progress is assessed. Positive change will not be easily accomplished if the state legislative and executive bodies cannot see that they also need to follow a systematic process for reform and change. At present, districts can take charge of their own destiny and move ahead in a positive and systematic manner, while always hoping that policy makers will be able to rise to a more supportive functional level of operation for improvement and development of high-value effective schools.

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EXHIBITS

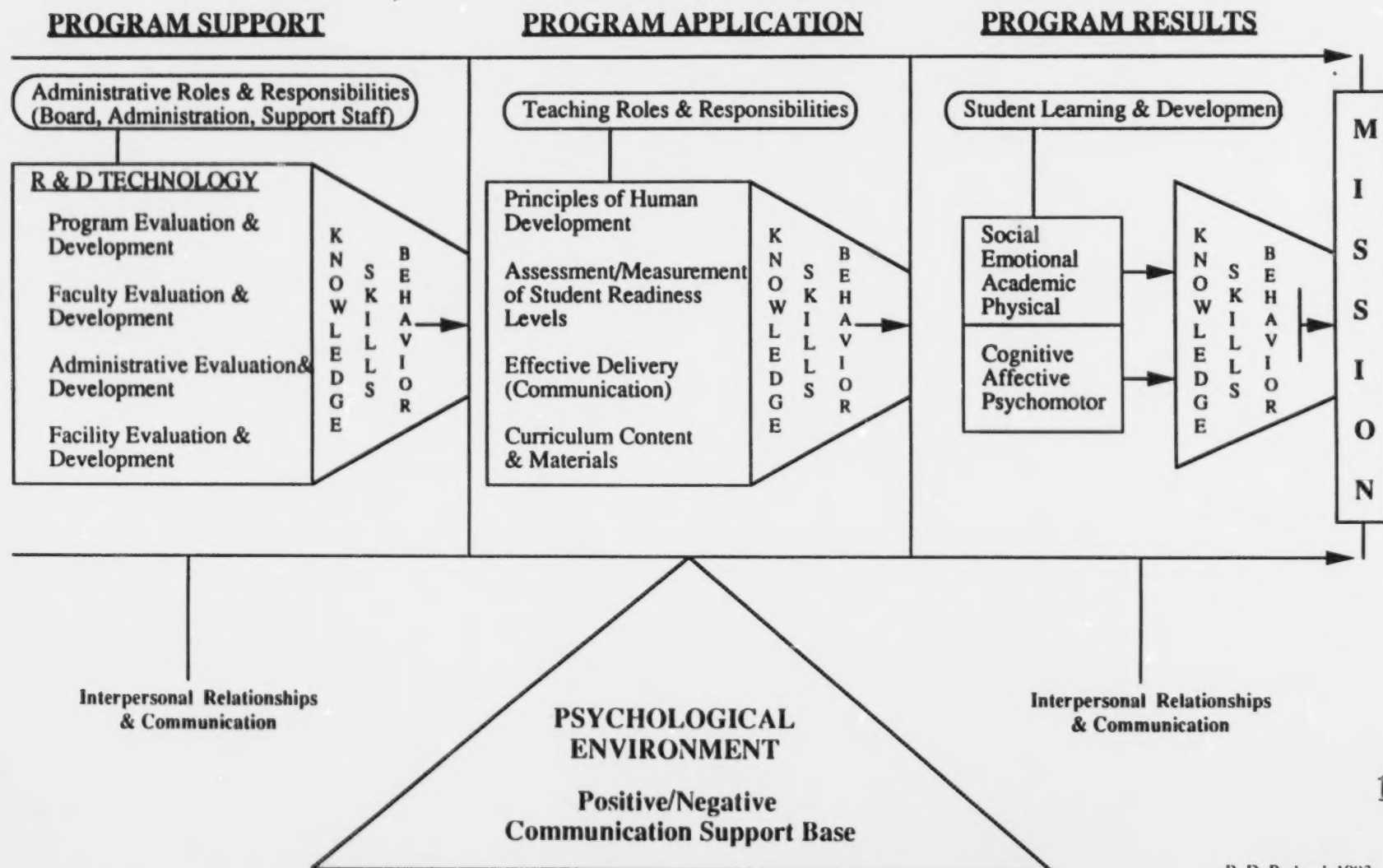
- Integrated Restructuring & Evaluation Program Using
Advanced Technological Procedures
 - Developmental Evaluation
 - Comprehensive Assessment & Evaluation
 - Evaluation Factors & Process
- Organizational Process Model for Planning,
Assessment & Restructuring
- Developmental Evaluation with a Focus on Student Learning
 - Human Development Model
 - Basic Quantitative or Qualitative
Evaluation Research Design
- Building & Activating a Comprehensive Evaluation System
for Positive School Development
- Effective Schools Interviews for Building a Long-Range
Developmental Evaluation System from Baseline
Information

**INTEGRATED RESTRUCTURING &
EVALUATION PROGRAM USING
ADVANCED TECHNOLOGICAL
PROCEDURES**

- I. Comprehensive evaluation systems are most effective when all interrelated evaluation plans and programs are developed through an integrated approach. Examples of possible interrelated evaluation activities are as follow:
 - A. Comprehensive long-range evaluation system based on student social, emotional and academic development.
 - B. NCA Outcomes-Based Accreditation.
 - C. Career Ladder school reform and improvement program, focused on student achievement.
 - D. Other District evaluation plans or programs.
- II. To be most effective and efficient, it is critical that each organizational component essential to student learning and development be included in evaluation plans.
 - A. Each critical component is identified, evaluated and profiled over a long-range (formative/summative) period.
 - B. A five to seven year cycle of formative and summative evaluation will provide time required to map the progress and development of each program component, and that of the total school system.
- III. The following models are drafts of ways to view the content and process of a comprehensive and holistic evaluation system:
 - A. Developmental Evaluation -- to achieve maximum realization of school mission.
 - B. Comprehensive Assessment & Evaluation -- to pictorialize context and content components, and evaluation cycle.
 - C. Evaluation Factors & Process -- to specify essential organizational components to be evaluated and profiled over a long-range period.
 - D. Developmental Evaluation With A Focus on Student Learning -- to list key areas for focus of the comprehensive evaluation and development program.

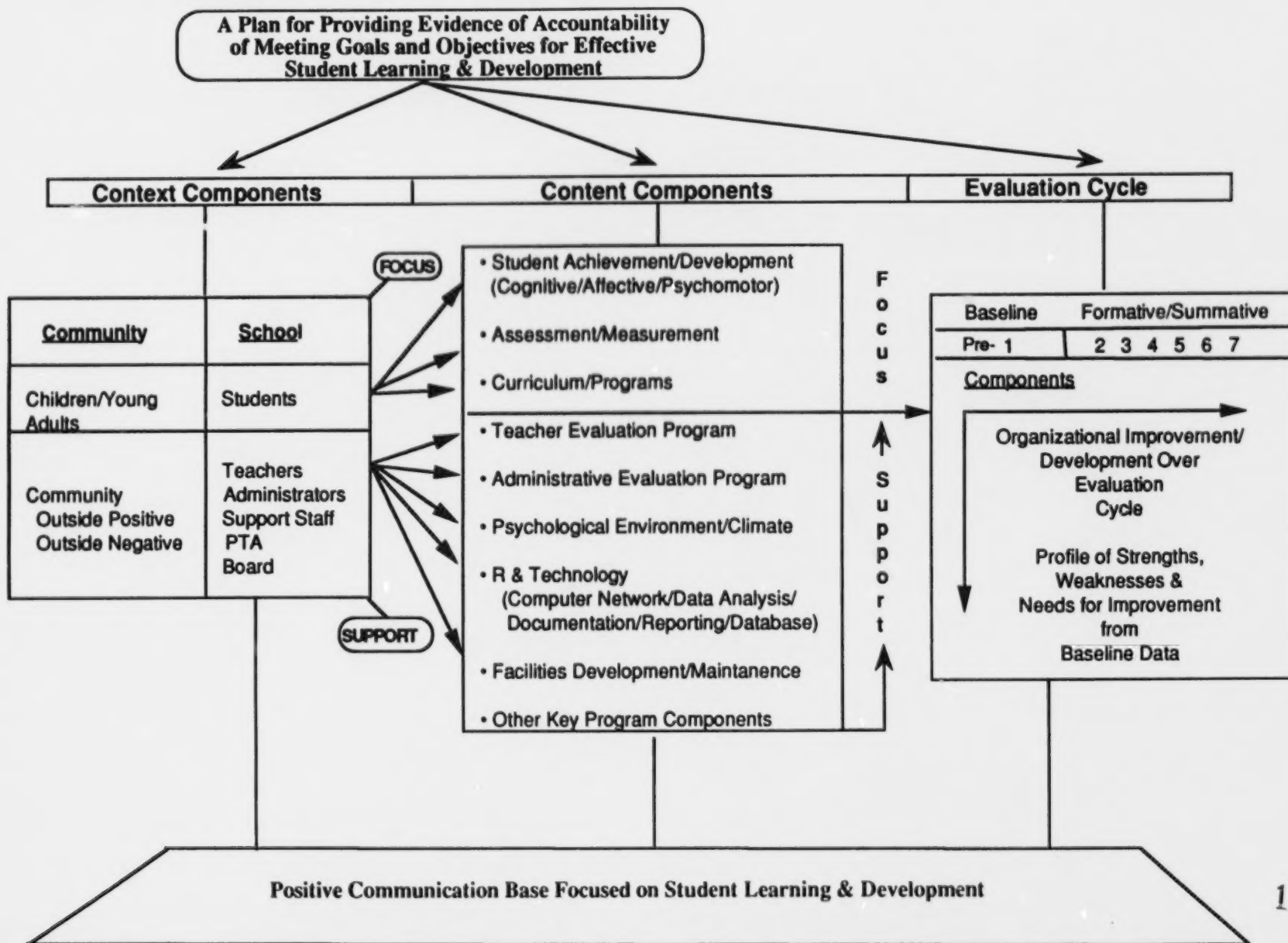
DEVELOPMENTAL EVALUATION

Meeting School Responsibilities & Goals Through
Comprehensive Evaluation & Development



COMPREHENSIVE ASSESSMENT & EVALUATION

Packard, 93



EVALUATION FACTORS & PROCESS

1. Identification & Documentation of Key Organizational Components
2. Baseline Data Collection, Analysis & Profile
3. Formative & Summative Evaluation Cycle

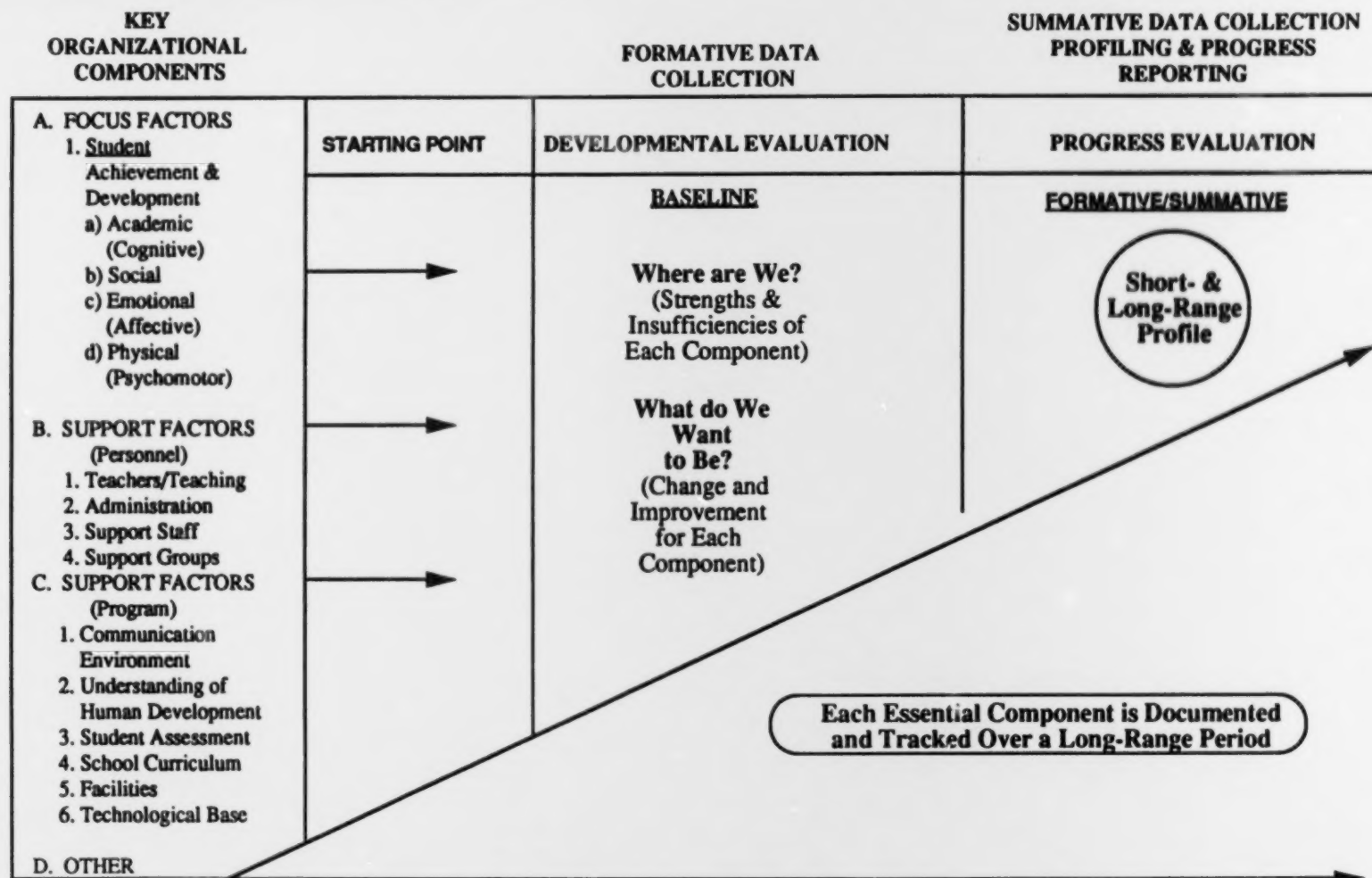
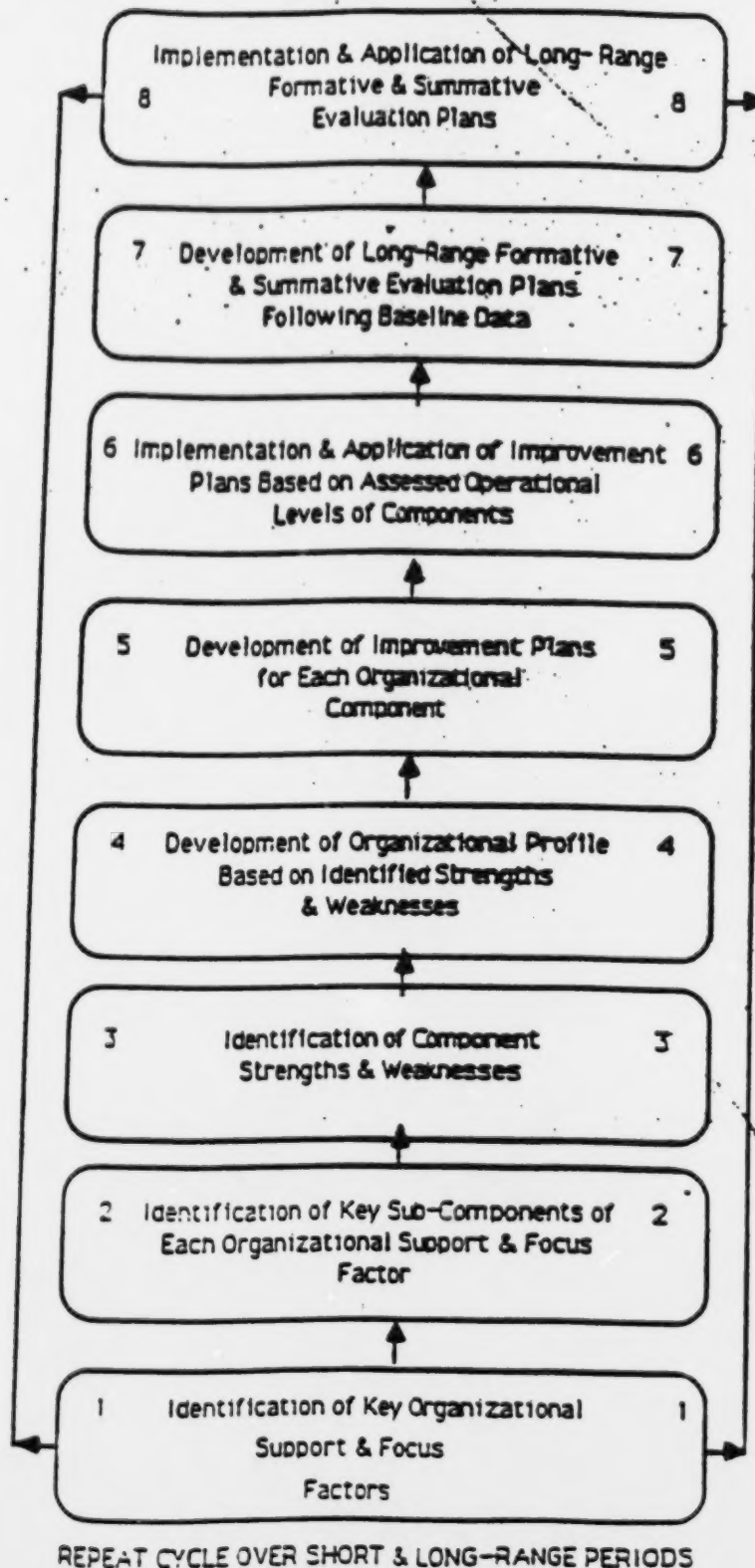


EXHIBIT A

Figure 1. Organizational Process Model For Planning,
Assessment & Restructuring



DEVELOPMENTAL EVALUATION
WITH A FOCUS ON STUDENT LEARNING:

**Professional Qualities of
Effective Teaching &
Learning**

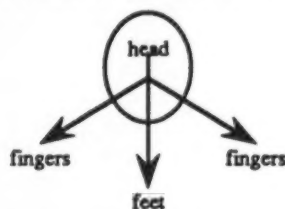
- I. Student learning and development is most effective when each individual person is exposed to "high-quality professionals."
 - A. Professional teachers are *understanding* and use *positive communication with interpersonal relationships*. All students learn to a greater degree when positive communication is used, rather than through application of negative and authoritarian procedures.
 - B. Teaching professionals are *astute observers*. They know how to *assess the readiness levels* of every one of their students through the use of *multiple observation* procedures. Each student learns to a greater degree when teachers have observed what level of knowledge or skills they have obtained and therefore, what they are ready to learn.
 - C. Teaching professionals know the principles, or *laws of human development and learning*, and they can apply their instructional procedures to the *readiness level* of each student. For examples, every individual is unique and will never be the same as any other person. Children develop from head to toe, and center to periphery. No matter what age, early learning of anything is slow, and it accumulates and gets faster as a person is exposed to related experiences; that's the way the brain works. Children and young adults develop sequentially; learning is accumulative, and time and timing of experiences is most effective depending on each unique person.
 - D. Teaching professionals have understanding, knowledge and skills of essential *content*, and the school's *curriculum* is *valid* for students to spend their time and energy learning. Students learn necessary content if it is positively introduced to all students at each one's individual readiness level.
- II. Developmental Evaluation involves ("setting the stage") securing plans and directions of *key stakeholders*.
 - A. Developmental Evaluation uses *data collection* procedures which set the direction of meeting the school system's responsibilities for student learning and development.
 - B. The *evaluation process* involves input from all stakeholders as to what needs to *change* and *develop*, and they need to provide direction as to how those improvements can most efficiently be accomplished. Program strengths, insufficiencies and needs for improvement (change & development) can readily be accomplished through multiple assessment (observational) procedures.

PRINCIPLES APPLIED TO DEVELOPMENT AND LEARNING

- Growth in any characteristic is continuous, orderly, unfolding & sequential



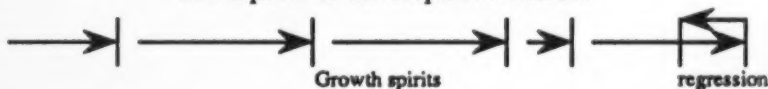
- Growth is from head to foot and center to periphery



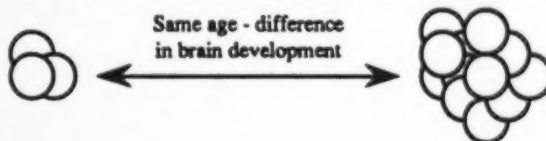
- Growth in structure is paralleled by functional changes

- Development in any characteristic proceeds at an uneven pace

- All aspects of development interact



- Each child differs from another in his/her rate of growth
- Time & timing with learning experiences are individually crucial
- Energies expended on one characteristic may get in the way of another
- Experiences are cumulative & based on previous level of development



- At any age early learning of any concept is slow
- Teaching beyond one's readiness level results in failure

BASIC QUANTITATIVE OR QUALITATIVE EVALUATION RESEARCH DESIGNS

Pre-Evaluation Design

X 0

The pre-evaluation design provides no usable information about the impact of program or teaching quality or effectiveness.

Pre- Post-Evaluation Design

0 X 0

The pre- post-evaluation design provides the evidence of accountability related to the impact of program and teaching quality or effectiveness.

Long-Range Evaluation Design

0 X 0 X 0 X 0 X 0 X X 0 X 0 >>

The long-range evaluation design provides the evidence of accountability related to the impact of program or teaching quality and effectiveness over a long-range period of time of formative and summative documentation and profiling.

0 = qualitative and/or quantitative assessment/measurement

X = application of teaching, program, development plans, improvements, etc.

Each key organizational component is evaluated on a time-series design proceeding from baseline readiness levels, tracked and profiled through analysis and documentation, and reported to all key stakeholders for planning and improvement.

BUILDING & ACTIVATING A COMPREHENSIVE EVALUATION SYSTEM FOR POSITIVE SCHOOL DEVELOPMENT

The Sedona/Oak Creek Unified School District and Northern Arizona University/Center for Excellence in Education Evaluation Partnership is to assist you in formulation and implementation of a comprehensive and long-range assessment, tracking and improvement program, which is designed to maximally influence the positive learning and development of students. Through the use of the most advanced research and development technology, each essential school component and developmental phase will be documented to provide critical information showing a clear picture of the educational impact and program success of your school system. All evaluative information and improvement plans will be secured from those of you who wish to be actively involved in this professional endeavor. Each key stakeholder's input is important to the total research, evaluation and improvement effort. Following are obligations, assumptions, expectations, roles and responsibilities of key individuals and groups in the support and evaluation of the total school system:

- Each student learns how to learn to his/her greatest potential and to take increasing responsibility for personal (and community) progress and success in the future.
- Each Parent or Guardian supports the school and assists his/her child in successfully learning to their greatest potential.
- Each Teacher understands and applies necessary curriculum content, assessment of learning readiness levels, the principles of human development and learning and appropriate and meaningful delivery for maximum positive impact on each student's learning.
- Each Administrator supports the parents, teachers and students in meeting their responsibilities of effective parenting, teaching and learning; evaluates the progress of all essential components which impact on student experiences within the school's responsibility; and based on assessed needs and objective information, directs implementation of school growth and improvement plans.
- Each Support Staff Member understands the importance of his/her role in assisting the school in providing the most positive learning experiences for students.
- The PTA & Other Internal Groups directly support the school's responsibilities, and provide positive programs which focus on important school development and improvement plans designed to impact positively on student learning and success.
- The Governing Board understands roles and responsibilities of students, teachers, administrators, support staff, internal school groups, community members, state and local policy and legal requirements, and makes appropriate board-level decisions which will provide the most positive environment for successful student growth and learning.
- The Community understands the roles and responsibilities of the school in meeting the public trust, and appropriately supports school programs and activities which have a positive impact on student learning and development.
- All individuals and groups responsible for maximum student learning and success understand and support the use of positive (not negative) communication processes and procedures.

Packard, 1993

EFFECTIVE SCHOOLS INTERVIEWS
FOR BUILDING A LONG-RANGE DEVELOPMENTAL
EVALUATION SYSTEM FROM BASELINE INFORMATION

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PURPOSE: The purpose of this initial focus-group information collection procedure is to determine what you (stakeholders) see as the level of development presently achieved for key components which impact the effectiveness of your school system. Your information will be used to determine your assessment of the strengths, weaknesses and needs for positive development of each important part of your organization over a long-range period of time. This initial assessment and report will provide information for you to make decisions about what areas need the greatest amount of attention and how you want to proceed in addressing future improvements. Later on, a cycle of assessments and reports (profiles) will allow you to see where you started and the extent of improvements made over a several-year period.

EFFECTIVE SCHOOLS: We know that effective schools develop a high-quality ("healthy") level of functioning within each important key component which impacts on the *school's mission and goals*. Each person who has a stake in the success of the school system (i.e., parents, students, teachers, administrators, governing board) has an important role and responsibility to serve. We need to know what you see your role to be, and how you can assist in developing and making improvements where needed.

ASSESSMENT OF EFFECTIVE SCHOOLS COMPONENTS: Within what you see to be your role and responsibility, each of you is being asked to provide your input into each key element which affects student and school success. In this first focus-group interview session, questions of what you see as *strengths, insufficiencies and needs for improvement* will be asked for the following effective school factors:

- **Positive Communication and Interpersonal Relationships**
- **Principles and Laws of Human Development and Learning**
- **Student Assessment of Learning and Development**
- **Cognitive, Affective and Psychomotor Curriculum Content**
- **Evaluation of School Personnel Effectiveness**
- **School Facilities, Materials and Supplies**
- **R & D Technology for Documentation & Tracking**
- **Other**